webTA Supervisor Manual

Table of Contents

Basics	3
Logging In and Logging Out	4
Changing Your Password	5
Online Help	6
Supervisor Main Menu	7
Certifying/Decertifying Records	8
Employee Summary Page	9
Certify All	11
Decertifying Records	13
Leave & Premium Pay Requests	15
Approving Requests	16
Revert to Pending	18
Calendar View	19
Request History	20
Leave Audits	21
Creating Delegates	23
Reports	24

Basics

There are a few things that you need to keep in mind while using webTA.

First, webTA is an Internet or intranet based application that differs from other computer applications, such as MS Word or Excel. Some of the processing in webTA is done on your computer, and some is done on a server. Because of the way the Internet works, there is not a constant connection between your computer and the server. So, when entering information in webTA, you must always tell the system that you want to save your work by clicking the appropriate button on the screen (usually the **Save** button).

If you use a web browser often, this system should be relatively simple to use. The biggest difference is that you should not use the **Forward** and **Back** buttons in your browser. You should use the navigation buttons within webTA, such as **Return**, **Save** and **Next**. If you do use the **Forward** or **Back** buttons, you risk losing data that you have entered.

Within a page, use your *Tab* key to move from one field to another or use your mouse to point to a field and click.

All time entered on the timecard is recorded as the number of hours, a colon, and the number of minutes (hh:mm). Minutes are recorded in 15-minute increments (00, 15, 30 or 45). Once a timecard is validated, it can be certified correct by the superivosr.

When you are done using webTA, you should properly exit the system by clicking the **Logout** button found at the top right of most screens. This ensures that data is properly saved and you are logged out of webTA. If there is no Logout button, you should complete the function you are using to get back to a menu or other screen with a Logout button.

The webTA system has a session timeout set on the server. If you leave webTA open and logged in for over 10 minutes, your session will expire and you will be logged out of the application. This is a security feature to prevent others from using your webTA account. If your session times out, simply log back into webTA to continue.

Logging In and Logging Out

Access to webTA data is controlled by user IDs and passwords. Enter your user ID and password, and then click **Log In**. If your user ID and password are entered correctly, a *Main Menu* is displayed. Otherwise an error message pops up.



After three unsuccessful attempts to log into webTA, you will be locked out of the system and the Pay and Leave Staff must reset your password.

To end your webTA session you should log out of the application by clicking **Logout** in the upper right corner of the page. The **Logout** link is displayed on all pages other than the Login page.

Changing Your Password

To change your password within webTA, click **Change Password** on a *Main Menu* page. It is located in the *User Functions* section at the bottom of the page.



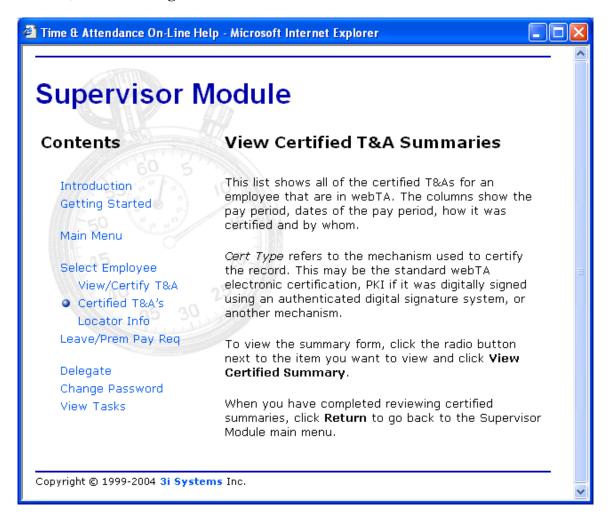
You should change your password on a regular basis and you should never give your password to any other person. Passwords should not be easy to guess. Avoid your spouse's and children's names. The best passwords are random alphanumeric strings. Your webTA password must be at least 8 characters in length. It must contain an uppercase letter, a lowercase letter, a number, and a special character (%, \$, &, etc.)

On the *Change Password* page, enter your current password. Then enter your new password twice, once in each of the fields provided, to verify that you did not make a typing error.

To save your new password, click **Save** and return to the *Main Menu*. Click **Cancel** to return without saving.

Online Help

Throughout webTA, every page has an associated help page. If you need additional information about the page, simply click the **Help** link in the banner at the top left of the window, next to the **Logout** link.



Help messages are displayed in a separate window from webTA. You can navigate the help screens using the contents links on the left side of the page. When you are finished viewing Help, simply close the help window.

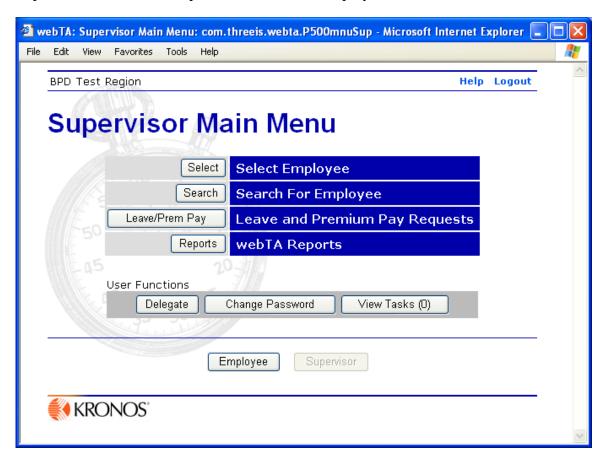
Supervisor Main Menu

The *Supervisor Main Menu* provides access for all time and attendance related functions of the supervisor.

As a supervisor, you are responsible for certifying all T&A reports for your employees before their data is sent to NFC for payroll processing. The law requires that the data be certified as correct prior to issuance of pay. Therefore, webTA will not create the transmission record for an employee until you or one of your delegates certifies it.

Supervisors can approve or deny leave and premium pay requests in webTA. Employees submit these requests online for your approval.

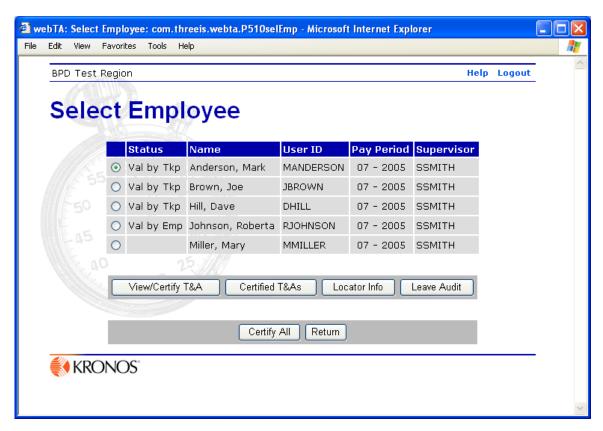
Supervisors can also run reports related to their employees' timecard information.



Certifying/Decertifying Records

From the Supervisor Main Menu, click Select Employee.

All of the employees assigned to you, or assigned to supervisors you are a delegate, of are listed in a table along with their current status. Their login user IDs are also shown for your reference.

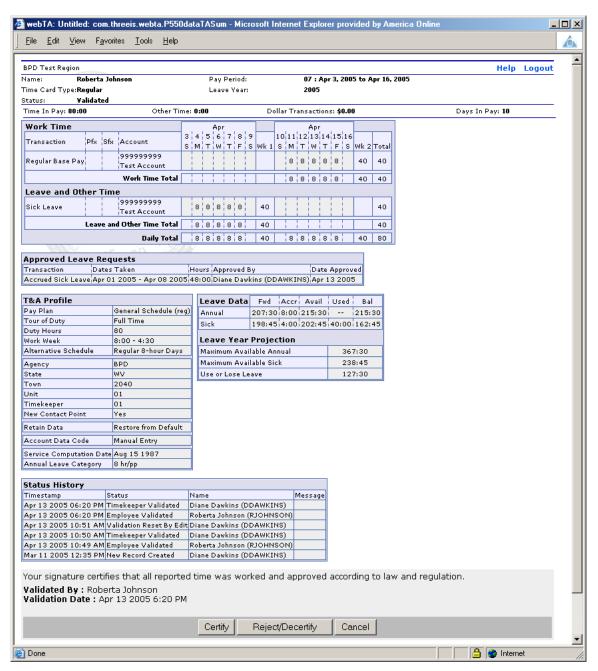


To select an employee, click the radio button next to the person you want to select. The bullet should fill in. Then click the button to **View/Certify T&A**.

You may certify all records at one time by clicking the **Certify All** button. You can then view and certify each record without having to select individual employees. Only records that have been verified successfully are displayed in the *Certify All* function.

Employee Summary Page

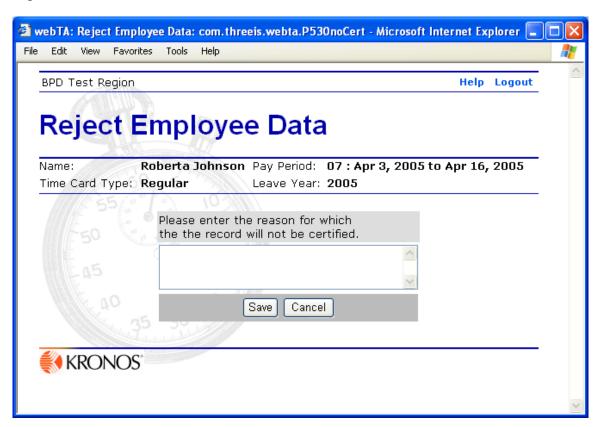
The employee summary is displayed with the name and current status at the top. The first section after the header is the payroll data for the employee. After the payroll data, employee profile and leave balance data are displayed.



At the bottom of the screen is the certification statement and options to **Certify**, **Reject**, or **Cancel**. If the record status is *Validated*, this function permits you to certify the record. If the record is not validated, you do not have the option to certify.

You can review all of the data and if it is correct and you want to certify it, click the **Certify** button. The data is locked so no changes can be made to it and you return to the *Select Employee* screen.

Click the **Reject/Decertify** if the data is not correct. The *Reject Employee Data* screen appears. You must enter a reason for not certifying the T&A report. The reason should be relatively short, but you may enter as much information as you feel necessary to explain the situation.

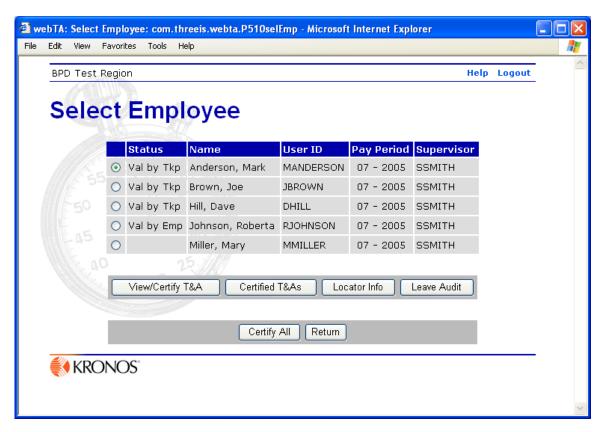


When you have entered a reason, click **Save**. The message will be sent to the employee's timekeeper. The webTA system will return you to the *Select Employee* screen.

Click **Cancel** to return to the Select Employee screen without taking any action on the timecard.

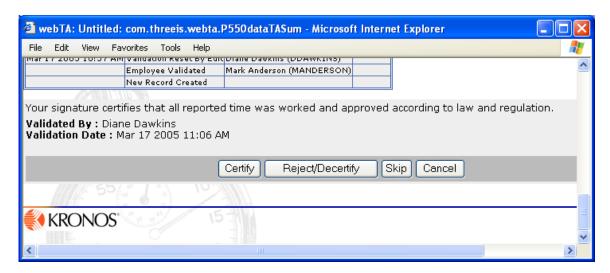
Certify All

You may certify all records at one time by clicking the **Certify All** button. You can then view and certify each record without having to select individual employees. You must still review and click **Certify** for each employee. Only records that have been validated successfully are displayed in the *Certify All* function.



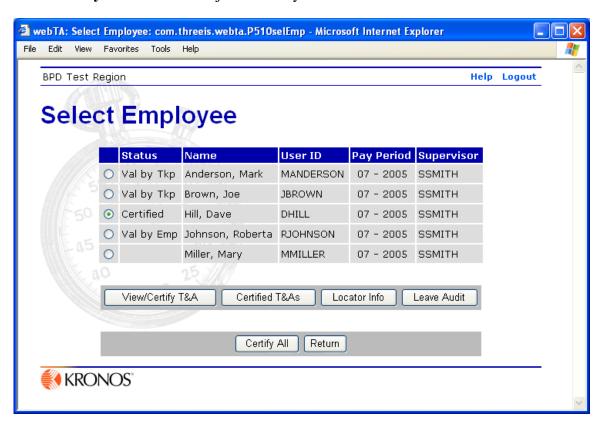
At the very bottom of the page is the certification statement and options to **Certify**, **Reject/Decertify**, **Skip**, **or Cancel**.

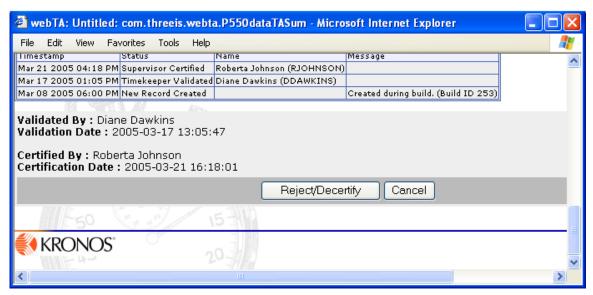
- Click **Certify** if the data is correct and you want to certify it. You will move to the next employee's timecard.
- Click **Reject/Decertify** if the data is not correct. The *Reject Employee Data* screen will appear. You must enter a reason for not certifying the T&A report.
- Click **Skip** to move to the next employee without certifying the current employee's timecard.
- Click **Cancel** to return to the *Select Employee* screen.



Decertifying Records

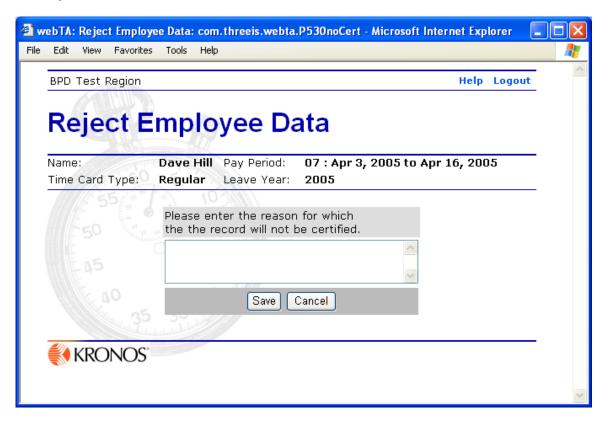
If you are asked to remove the certification from a record, you can do so by selecting **View/Certify T&A** and then reject/decertify the certified T&A.





The *Reject Employee Data* screen will appear. You must enter a reason for decertifying the T&A report. The reason should be relatively short, but you may enter as much information as you feel necessary to explain the situation.

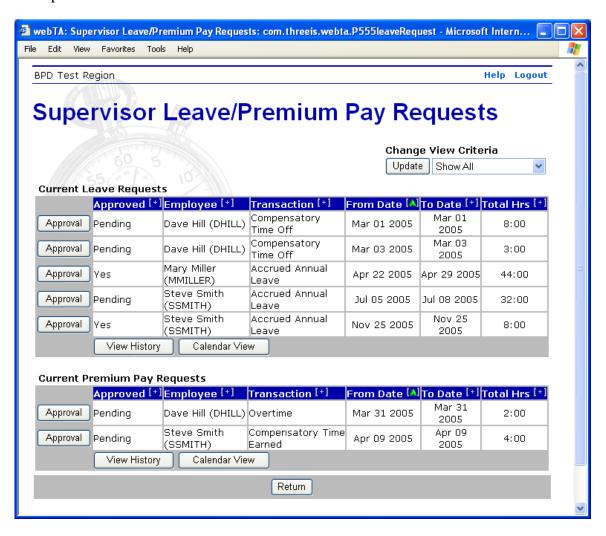
When you have entered a reason, click **Save**. The certification will then be removed.



Leave and Premium Pay Requests

From the *Supervisor Main Menu*, click **Leave/Prem Pay** to access the leave and premium pay requests. The table will list all pending or approved leave requests for the previous pay period, current pay period, and future pay periods for employees assigned to you or assigned to supervisors who have selected you as a delegate. To view requests for your employees only, click the down arrow in the *Change View Criteria* box and select **Show My Employees**. Then click **Update**.

The list of requests can be sorted by any of the columns in the table. Click the [+] sign at the top of that column to resort the list.

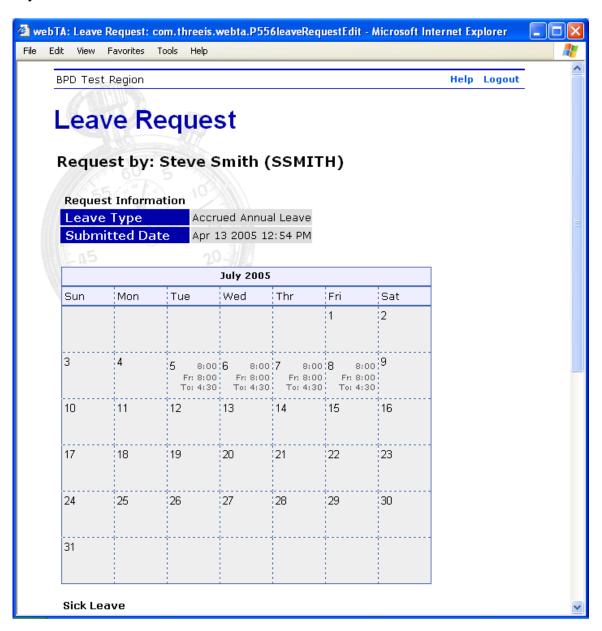


The approval codes for leave requests are:

- Pending A new leave request that has not been approved or denied.
- Yes A leave request that has been approved.
- No A leave request that has been denied.

Approving Requests

To select a request, click the **Approval** button next to the request you want to select. The request is displayed in a calendar format, showing the number of hours requested on each day.



Following the calendar are blocks for *Sick Leave* and *Family and Medical Leave Act* (FMLA). If the employee requested sick leave or invoked FMLA, the reason for the request is noted under that block.

If the employee entered any Remarks, they are available for you to view. You may also enter any comments in the *Remarks* block.

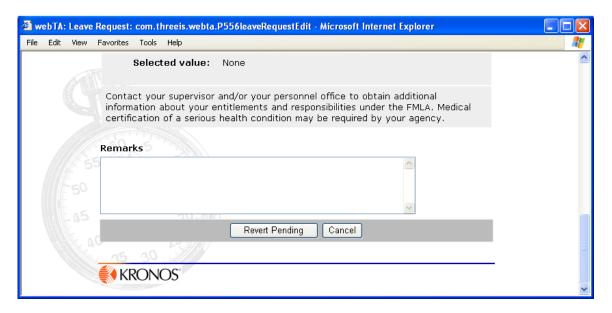


There are three buttons at the bottom of the page: Approve, Deny and Cancel.

- Click **Approve** to authorize the leave requested.
- Click **Deny** to reject it.
- Click **Cancel** to leave the request in Pending status.

Revert to Pending

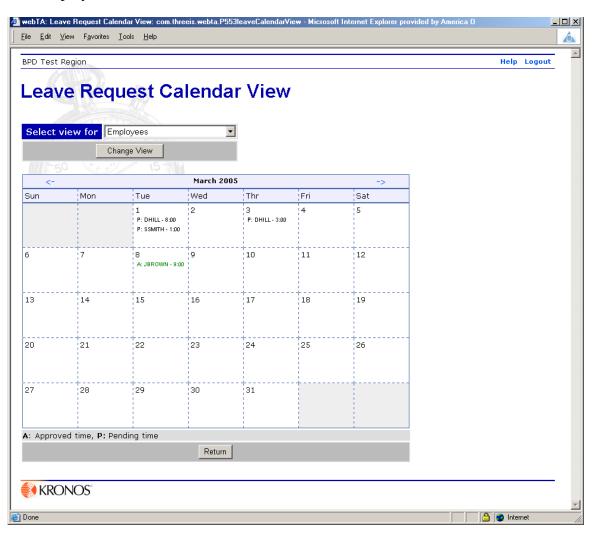
After a request has been approved or denied, you can change the request's status back to Pending. Select the request and click **Revert to Pending**. At this point, the employee can edit the request.



Calendar View

All pending or approved requests can be viewed in a calendar format. Click **Calendar View** from the *Employee Leave/Premium Pay Requests* screen. The calendar will show all your employees' requests. However, you can also include employees' of supervisors who have selected you as a delegate. Click the down arrow in the *Select view for* box and select **Employees (including delegates)**.

A line in the calendar shows the status, user ID, and total number of hours requested for each employee.



Request History

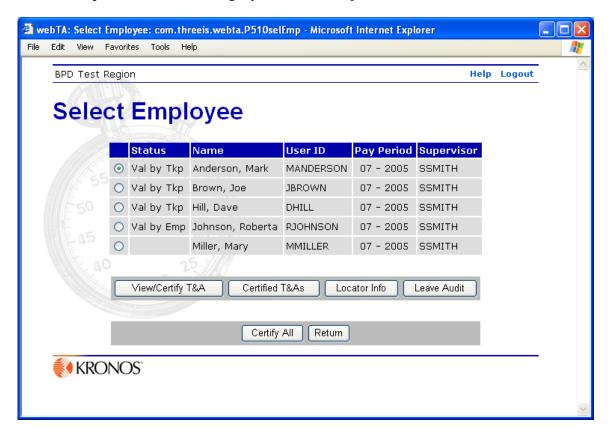
Click **View History** to view a list of your employees' previous leave or premium pay requests. The list of requests can be sorted by any of the columns in the table. Click the [+] sign at the top of that column to resort the list.

You can delete any of the requests in this list. Select the request and click **Delete** at the bottom of the screen. You can also open any request and change the status back to *Pending*. Select the request you want to view and click **View** then **Revert to Pending** at the bottom of the request.



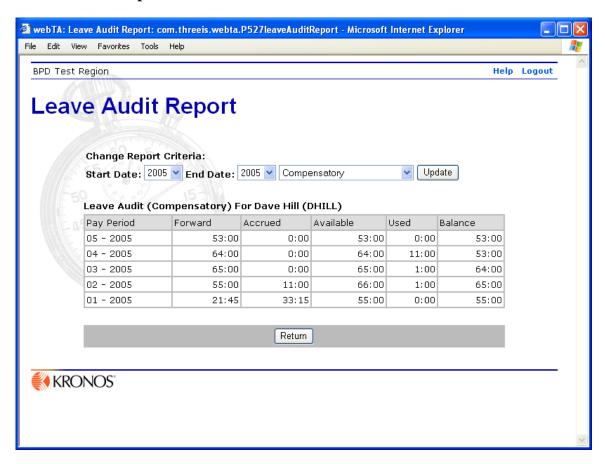
Leave Audits

Supervisors can view a report showing an employee's leave usage through the year. To view this report, click **Select Employee** from the *Supervisor Main Menu*.



Select the employee, then click Leave Audit.

Select the starting leave year, ending leave year, and type of leave from the drop-down lists. Then click **Update**.



Creating Delegates

You can delegate your supervisor role to one or more alternate supervisors. As long as your delegates are active, they can view, approve and reject T&A records and leave and premium pay requests.

It is a good idea to have at least one delegate at all times. That way your delegate will be able to perform your webTA supervisor responsibilities in the event that you are not available. However, you may have as many delegates as you like.

To manage delegates, simply click **Delegate** on the *Supervisor Main Menu*.

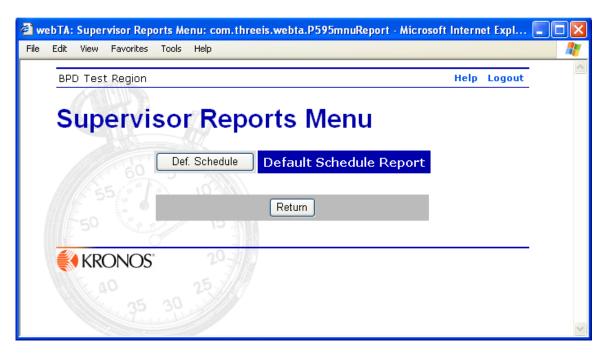


You can click **Undelegate All** to clear the list of delegates. Alternatively, you may click **Del** next to any existing delegate that you want to remove from your list.

To add a delegate, simply type their user ID in the field and press **Enter** or click **Add**. If you do not know the user ID of the person you want to delegate to, simply click **Search** to find it.

Reports

You can run a report listing the default schedule for each of your employees. To view this report, click **Reports** from the *Supervisor Main Menu*, then **Def. Schedule**.



The default schedule report will list all the employees that are using default schedules. The list includes the employee's name, user ID, alternative schedule type, and the number of hours worked each day of the pay period. The report is sorted by employee name.

